# Learning to Use the Viewer

This section introduces you to the Viewer controls, as well as to the various parts of a form.

Form A form is made up of the form body plus an optional toolbar.

Control Bar This contains the commands you can use to operate the Viewer. Depending on how your system developer has written the forms you are using, some of these buttons may not be available in every form.
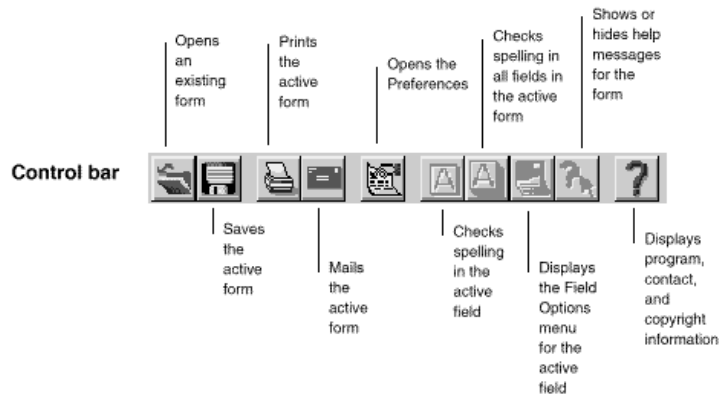
Toolbar A form's toolbar contains items for quick access. If you scroll down in the body of the form, the toolbar remains on top. Note that toolbars contain all the submit buttons for the forms.

Form Body This is the part of the form that you fill out. It usually contains text fields, check boxes, buttons, radio buttons, and lists.

Saving a Form

You can save a form just as you would save any other document.

To save a form:

1) In the control bar, click Save Form.
2) Type in a file name, giving it the extension .frm.

Filling Out Special-Purpose Fields

Some fields you fill in may be formatted to accept only certain characters (dates or dollar amounts, for example). An Internet Form will not let you submit it if you have left any formatted fields incomplete or incorrectly filled.

An Internet Form will not let you tab out of an incorrectly filled field. If you try to tab out of the field, the Viewer will display an error message. However, if you move out of such a field by clicking on another item, the Viewer will highlight the error in the field you left and display an error message.

If you want the Viewer to check for errors as you type into formatted fields, rather than waiting until you tab out of the field, you can turn on Predictive Input Checking in the Preferences.

Mandatory Fields
Some fields, called mandatory fields, require input. These fields are colored
yellow in the Viewer to indicate that you must enter a value. An Internet
Form will not let you submit if you have left any mandatory fields
incomplete.
An Internet Form will not let you tab out of a mandatory field until you
have typed in a value. If you try to tab out of the field, the Viewer will
display an error message.

Filling in Date Fields
Some fields in a form may require that you enter a date in a particular
format. However, Internet Forms are capable of converting dates from
many styles into the format the form requires.
If you want to enter dates quickly using a numeric format like 29/04/97,
you will need to specify in the Preferences what you mean by each number.
That way, if you enter 04/05/97, the form will be able to tell whether you
mean April 5th 1997 or May 4th 1997.
To specify your preferred date format:
1) On the control bar, click Preferences, and then scroll to the section called
I Prefer to Enter Dates.
2) Click the format you want to use.
Automatic Date Fields
The Viewer will automatically insert the current date into some fields. If you
want a different date in these fields, just type over the current date.

Word Processing
Text fields in Internet Forms have some of the capabilities of word
processors. In addition to typing into fields, you can:
• Import text blocks
• Use the drag-and-drop method of moving and copying text
• Perform search-and-replace operations
• Check spelling
• Extract copies of text blocks to separate files
• Print the contents of the field
• Undo and redo actions
To perform these functions, you use a menu built in to each field on the
form, called a field menu.
Displaying the field menu
There are three ways to display the field menu:
• Position the pointer over the field you are working in and click the RIGHT
mouse button.

• Place the cursor in the field and press SHIFT + F10.

• On the control bar, click Field Options.

Field Options

Importing Text From Other Files
In addition to typing text, you can import text from other text files into
fields. The files you import the text from must be in text-only format.
To import the text of another file:

1) Place the cursor in the position where you want to place the text and click the RIGHT mouse button to bring up the field menu.
2) Choose Insert File, and then choose the text file to insert.

Moving and Copying Text

You can move and copy text in form fields by the traditional cut/copy/paste method. You can also drag selected text to a new position using the drag-and-drop method.

You can move or copy text within a field, between fields in a form, or between fields in any open forms.

Note To drag and drop text means to highlight the selection you want to move or copy, and drag it to a new location.

To copy text:
1) Highlight the text you want to copy.
2) Point to the selection and click the right mouse button. A drag-text pointer will appear.
3) Drag the pointer to the spot where you want to place the copy. You will see a grey bar indicating the insertion point.
4) Release the mouse button. A menu appears.
5) From the menu, choose Copy Text.
If you do not want to place the text, choose Cancel.

Quick Route You can also use the left mouse button to drag the text to the new location. When you release the mouse button, the Viewer places the text without bringing up the menu.

To move text:
1) Highlight the text you want to move.
2) Point to the selection and click the right mouse button. A drag-text pointer will appear.
3) Drag the pointer to the spot into which you want to move the text. You will see a grey bar indicating the insertion point.
4) Release the mouse button. A menu appears.
5) From the menu, choose Move Text.
If you do not want to place the text, choose Cancel.

Checking Your Spelling

When you check your spelling, you can check one or more highlighted words, all words in a single field, or all words in all fields.

To check one or more highlighted words:
1) Highlight the word or words.
3)   Do one of the following:

• On the control bar, click Check Spelling.

• From the field menu, choose Spell Check.

Check Spelling

To check all words in a single field:
1) Leave the cursor in the field, but do not highlight anything.
2) Do one of the following:
• On the control bar, click Check Spelling.
• From the field menu, choose Spell Check.

To check all fields:
On the control bar, click Check All Spelling.

Check All Spelling

Help Mode

Some forms have small help messages to aid users. These messages are not online help—they are unique to the particular form.

Help Mode

To check whether your form contains help messages, click Help Mode on the control bar. If the words Help Mode are black, your form contains at least one help message. If the words are greyed out, there are no help messages in your form.
To access the help messages:
1)   On the control bar, click Help Mode.

2) Move the mouse pointer over the form, until the pointer changes to a plain question mark. This means you are pointing at an item with an associated help message.

Help Available
Pointer

3) Click the mouse button. A help message appears for the item the pointer is over.

While Help Mode is on, you can move around and fill in the form using the keyboard, but not the mouse.
To turn the help messages off:
• On the control bar, click Help Mode.

Printing Forms

You can print the form by clicking Print on the control bar.

Print

Submitting Forms

When you have finished filling in a form, you can submit it for processing by clicking a submit button.

Viewer's Mail Form Command

To send a form over email to one or more recipients, click Mail Form on the control bar.

Mail Form

This brings up an address form. (See "Emailing Forms" below)
Note If you have not filled out all of the mandatory fields, or if some formatted fields have been filled out incorrectly, the Viewer will not allow you to email the form.
Emailing Forms
When you email a form using the Viewer, the Viewer may bring up an address form for you to fill out. It encloses the form you want to mail into this address form.

To email a form:
1) Ensure that your email Preferences are set up (see "Email Preferences" below). If they are not, the Viewer will ask you to set them up before it can send the form.
2) Click a mail control in the form, or click Mail Form on the control bar.
3) Fill in the address form.
• If you chose a mail control in the form, it may already contain a recipient's address. If so, that recipient's name will appear in the Mail To field.
• To send the form to more than one person, enter each email address, separated by commas, into the Mail To field. For example,

Mail To.   lree@business.coastal.com, mdbell@bronm.com

4)   Click Send Mail.

Email Preferences
In order to email forms from the Viewer, you need to set up your email Preferences.

Preferences

To set up email Preferences:
1)   On the control bar, click Preferences.

2) In the Preferences form that appears, enter the following information:
• SMTP server: <the name of your mail server>
• Return address: <your email address>

3) Click Save.
Note If you try to email a form and have not yet set up the email
Preferences, the Viewer will ask you to fill them in first.

Customizing the Viewer

Preferences

To customize the Viewer, click Preferences on the control bar.

Mail Configuration
To send email forms from the Viewer, you need to fill in the Mail
Preferences as follows:
SMTP server: <your mail server>
Return address: <your email address>
Field Options
Form developers can design Internet Forms to check for errors when you
type in fields. You can customize the behavior of the error checking with the
following options.

Field Options

☐ Do Predictive Input Checking —————— Checks for errors as you type into formatted fields.

I Prefer to Enter Dates:

○ Day-Month-Year (30/12/99)
◉ Month-Day-Year (12/30/99) —————— Specifies how formatted fields should interpret dates you type in numeric format.
○ Year-Month-Day (1999-12-30)

Do Predictive Input Checking
When you select this option, the form will check for errors as you type. This will prevent you from typing in mistakes. When you deselect this option, the form will check for errors only when you move out of the field, and before you submit the form.
NOTE: THIS FIELD SHOULD BE CHECKED.

I Prefer to Enter Dates:
This option tells the form how to interpret dates that you enter in numeric format. For example, if you specify in the Preferences that you will enter dates in the format Day-Month-Year, then the form will interpret 03/04/97 as April 3, 1997. If you specify that you will enter dates in the format Month-Day-Year, then the form will interpret 03/04/97 as March 4, 1997.
To avoid confusion, you can also enter dates in long format, such as March 4, 1997.
Date checking occurs only in fields to which the form developer added error checking.

Form Print Options

You can customize the appearance of forms you print to your local printer.

Conversion Options: **Page Layout Defaults:**
☐ Print Radio Buttons as Check Boxes   ◉ Fit to Page
☐ Don't Print Scroll Bars on Fields   ○ Tile In One Direction
☐ Print Single Line Fields as Lines   ○ Tile In Two Directions
☑ Print Border Around Form Edge

Conversion Options
Forms designed to make data entry easy often don't look as good when printed. For example, text field borders and scroll bars look blocky, and radio buttons always print with one per group selected—whether you have filled the form in or not.
By selecting the following conversion options, you can make printed forms look cleaner.
Print radio buttons as check boxes
This feature converts all radio buttons in a page to empty check boxes in the printout.
Important Use this feature only if you are printing out electronic forms you want to fill in by hand. If you select a radio button as a choice when filling in a form, and then print the page with the Print Radio Buttons As Check Boxes option turned on, your choice will not appear on the printout.
The check boxes from converted radio buttons will all be printed blank.
Don't print scroll bars on fields
This feature removes scroll bars from text fields on a printed page.

Print single line fields as lines
This feature removes the border around single-row text fields on printouts, and prints a single line along the field's bottom instead.

This feature does not apply to fields that are more than one row high.
Print border around form edge
This feature prints a frame around the page, marking its edges.
Page Layout Defaults
You can specify default page layout options in the Preferences. Each time you print to your local printer, the Viewer brings up a Print dialog box. The defaults you set will be selected.
If, when you print, you want to override the default settings, just enter the appropriate changes into the print dialog box.
Single Page Fits the printed page onto one piece of paper.
Tile In One Direction If the page is larger than the paper you want to print it on, the Viewer will fit the shorter
dimension on the paper and tile the longer
dimension over several pieces of paper. The
printed page is reduced proportionately, so that it
does not appear distorted.
Tile In Two Directions The page is printed as its actual size. If the page is larger than the paper you want to print it on, the
Viewer will tile it over several pieces of paper,
both horizontally and vertically, if necessary.